

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR MARCH 2025

PRODUCTION

Tea production for March, 2025 was lower by 16.41 Million Kgs (30.20%) from 54.34 Million Kgs recorded during 2024 to 37.93 Million Kgs. It was also lower compared to 44.61 Million Kgs recorded in February and 54.36 Million Kgs in January this year. Though March marks the onset of the "Long Rains" season (March-May), it was attributed to prolonged hot and dry weather conditions experienced during February and part of March. In addition, the onset of the "Long Rains" season in the country, which occurred between the second to the fourth weeks of March, was characterized by lower rainfall (near-to-above the March Long Term Mean (LTM)). Within the tea growing areas, the first week of March was dry while the rest of the month recorded moderate precipitation ranging from an average of 13 to 56 mm daily in the West of Rift and 7 to 73 mm daily in the East of Rift.

The effect of adverse weather conditions on tea production during March this year was more pronounced in the West of Rift, consequent to which the tea output within the Region dropped by 32.92 % from 35.78 Million Kgs recorded in March last year to 24 Million Kgs. Within the East of Rift, output dropped by 24.97% from 18.56 Million Kgs to 13.92 Million Kgs.

Owing to the effects of dry weather conditions in both the West and East of Rift, all tea producers were equally affected with the smallholder factories under the Management of KTDA, recording a production decline of 31.05% (9.20 Million Kgs) from 29.63 Million Kgs during the corresponding month of 2024 to 20.43 Million Kgs. The Estates factories recorded a decline of 34.36% (4.32 Million Kgs) from 12.57 Million Kgs to 8.25 Million Kgs. Within the independent tea factories, drop in production was 23.88% (2.79 Million Kgs) from 11.71 Million Kgs to 8.91 Million Kgs. The decline in production within the state-owned Nyayo Tea Zones was relatively lower at 21.94% from 412,183 Kgs to 321,754 Kgs.

During the month of March, specialty teas produced was 934,474 Kgs, which represented 2% of the total production. Specialty teas were dominated by Orthodox teas at 99% and was largely produced by Plantation and Independents tea factories. The rest of specialty teas consisted of Green and Purple tea types.



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Owing to the effects of hot and dry weather conditions during February and March this year, cumulative production for the first quarter was lower by 18.87% (31.84 Million Kgs) from 168.76 Million Kgs to 136.91 Million Kgs. Going by the trend for the first quarter, production for the whole year is projected at 580 Million Kgs, which will be lower compared to 594 Million Kgs recorded in 2024 but slightly higher than 570 Million Kgs in 2023.

1: Production by Sub-Sector and Region (2025 vis-à-vis 2024)

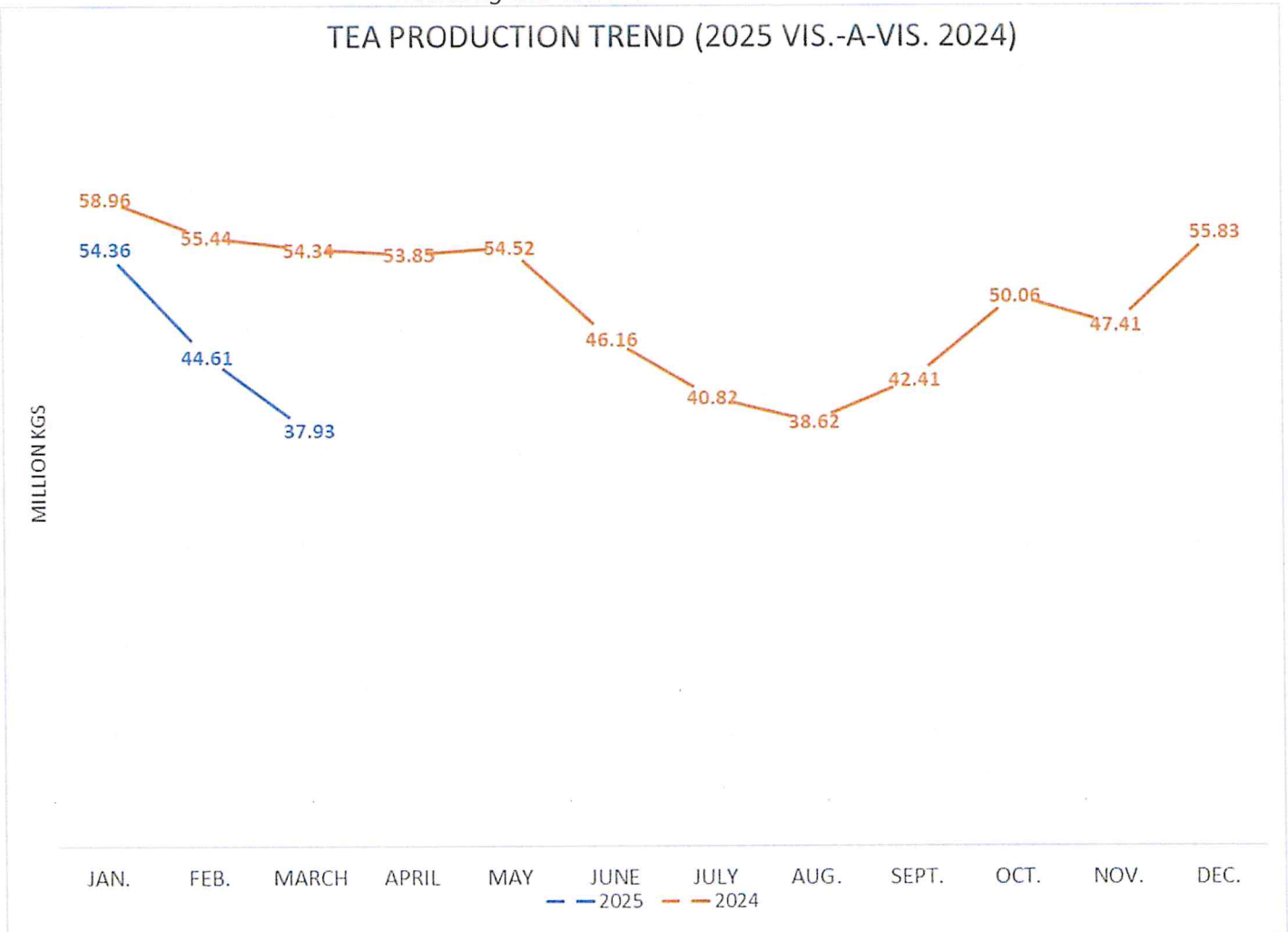
Sector/factory	Block	Mar-25	Mar-24	Variance +/-	Var.(%)	Jan-March 2025	Jan-March 2024	Variance +/-	Var.(%)
Estates	West of Rift	8,004,935	12,239,679	- 4,234,745	-34.60%	30,119,668	36,948,843	- 6,829,176	-18.48%
	East of Rift	251,757	339,444	- 87,688	-25.83%	1,032,741	1,125,654	- 92,914	-8.25%
	Total	8,256,691	12,579,123	- 4,322,432	-34.36%	31,152,408	38,074,497	- 6,922,089	-18.18%
Smallholders-KTDA	West of Rift	7,707,825	13,287,240	- 5,579,415	-41.99%	28,784,225	41,057,179	-12,272,954	-29.89%
	East of Rift	12,727,432	16,351,800	- 3,624,368	-22.16%	42,864,938	51,854,437	- 8,989,499	-17.34%
	Total	20,435,257	29,639,040	- 9,203,782	-31.05%	71,649,163	92,911,616	-21,262,453	-22.88%
Independents	West of Rift	8,047,349	9,999,361	- 1,952,012	-19.52%	29,703,309	31,405,411	- 1,702,102	-5.42%
	East of Rift	871,532	1,717,692	- 846,160	-49.26%	3,251,244	5,025,303	- 1,774,059	-35.30%
	Total	8,918,881	11,717,053	- 2,798,172	-23.88%	32,954,553	36,430,713	- 3,476,161	-9.54%
Nyayo T. Zones	West of Rift	247,046	260,290	- 13,244	-5.09%	853,186	833,116	20,070	2.41%
	East of Rift	74,708	151,893	- 77,185	-50.82%	305,622	511,669	- 206,047	-40.27%
	Total	321,754	412,183	- 90,429	-21.94%	1,158,808	1,344,785	- 185,977	-13.83%
Estates, Smallholder, Independents & Nyayo Tea. Zones	West of Rift	24,007,155	35,786,570	-11,779,416	-32.92%	89,460,388	110,244,549	-20,784,161	-18.85%
	East of Rift	13,925,429	18,560,829	- 4,635,400	-24.97%	47,454,544	58,517,062	-11,062,518	-18.90%
	Grand Total	37,932,583	54,347,399	-16,414,816	-30.20%	136,914,932	168,761,612	-31,846,679	-18.87%

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TEA PRODUCTION TREND (2025 VIS.-A-VIS. 2024)



TEA SALES

AUCTION

During March, auction sales volume for Kenya tea stood at 34.27 Million Kgs, which was lower compared to 42.35 Million kgs recorded during the corresponding month of last year and 35.89 Million Kgs in February this year. The weighted average monthly auction price for Kenya tea was slightly higher at 2.22 USD per Kg against 2.15 USD in the same period of last year. In addition, absorption of teas on offer was higher at 78% compared to 55% for the same period of last year.

Notably, prices of tea followed the quality, with “Best” category of CTC “Leaf” and “Dust” grades (well sorted and those with brighter liquors and appearance) fetching higher prices compared to “medium” and “plainer” categories which attracted discounted prices or no bid

by the buyers and consequently constituted the highest proportion of teas on offer at the auction that were withdrawn. Similarly, secondary grades and reprint offers for particular garden marks also fetched lower prices.

During the month of February 2025, tea offered for sale by the smallholder tea factories whose quality is relatively higher compared to other producers, fetched a relatively higher weighted average price of 2.54 USD per Kg for the main grades. However, in comparison to the same period of 2024, the average prices for the smallholder tea factories was slightly lower.

Though there was generally good demand for tea offered at the auction, prices continued to be impacted negatively by the effect of global economic shock experienced in most countries due to the Russia-Ukraine crisis. The situation has been exacerbated by higher quantities of carry-over stocks along the value chain occasioned by increased production in the last two years. Other emerging challenges affecting auction sales include delay in shipments to Europe and North Africa owing to attack of vessels along the Red Sea route by rebels and market access challenges in Sudan. During the month of March, there was also reduced demand due to the observance of Ramadhan in Muslim religious countries.

Table 2: Auction Sales (2025 vis-à-vis 2024)

	2025		2024		2023	
	Vol. M. Kgs	Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)
JAN.	33.76	2.26	42.48	2.19	32.70	2.33
FEB.	35.89	2.25	39.11	2.23	39.14	2.31
MARCH	34.27	2.22	42.35	2.15	35.42	2.39
APRIL			43.60	2.29	26.93	2.39
MAY			31.05	2.18	36.75	2.19
JUNE			28.47	2.14	52.94	2.09
JULY			34.14	2.21	26.77	2.06
AUGUST			25.11	2.20	61.16	2.25
SEPT.			22.60	2.25	42.97	2.25
OCT.			32.58	2.07	58.28	2.16
NOV.			31.08	2.22	48.69	2.17
DEC.			23.72	2.19	26.95	2.19
TOTAL/AVG.			396.29	2.19	488.7	2.23

EXPORTS

The total export volume for the month of March 2025 was slightly lower by 7.15 Million Kgs from 54.33 Million Kgs recorded in the same period of last year to 47.17 Million Kgs. It was also lower compared to 42.34 Million Kgs exported during the previous month.

During the month of March, Kenya tea was shipped to fifty-eight (58) export destinations, similar to the corresponding period of last year. Pakistan maintained the leading export destination for Kenyan tea having imported 17.4 Million Kgs, accounting for 36.9% of the total export volume. Other key export destinations for Kenya tea were Egypt (5.85 Million Kgs, 12.4%); UK (3.01 Million Kgs, 6.4%); UAE (2.61 Million Kgs, 5.5%); Russia (2.03 Million Kgs, 4.3%); Jordan (1.65 Million Kgs, 3.5%); Sudan (1.41 Million Kgs, 3.0%); China (1.17 Million Kgs, 2.5%); Kazakhstan (1.03 Million Kgs, 2.2%); Oman (1.02 Million Kgs, 2.2%).

The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 78.9% of Kenya tea export volume. Amongst the ten key markets Jordan, Oman, Kazakhstan and China recorded increased imports for Kenya tea. There was also significant increase in exports to Nigeria and Poland and to emerging and seasonal markets such as Eritrea; Angola; Azerbaijan; Morocco; Austria; Bahrain; Mali; and France.

During the month of March, value added tea exports amounted to 1.45 Million Kgs, which represented 3% of the total export the volume. The exports in value-added form were shipped to twenty-eight (28) market destinations which included United Kingdom; Somalia; Yemen; Sudan; Ireland; USA; Burkina Faso; Cote D'ivoire; Mali; South Sudan; France; India; Angola; Japan; Malaysia; Niger; Ghana; Italy; Brazil; UAE; Hong Kong; Saudi Arabia; Swaziland (Eswatini); South Africa; Canada; Vietnam; Czech Republic and Pakistan. Out of the total value-added tea exports, United Kingdom accounted for the highest volume at 31%.

LOCAL TEA SALES

Local tea sales for March was slightly higher at 3 Million Kgs against 2.94 Million Kgs for the same period of 2024 and 2.97 Million Kgs recorded during the corresponding month of March 2023. However, cumulative tea sales for the three months period up to March 2025 was lower at 8.52 Million Kgs against 9.07 Million Kgs for the corresponding period of 2024 and 8.91 Million Kgs for the same period of 2023.

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Table 3: Local Sales Trend

	2025 (Million KGS)	2024 (Million KGS)	2023 (Million KGS)
January	2.88	3.30	3.02
February	2.64	2.83	2.92
March	3.00	2.94	2.97
April		3.22	2.56
May		3.32	3.08
June		2.86	2.85
July		2.74	3.09
August		3.28	3.71
September		2.74	2.99
October		3.34	3.34
November		3.26	3.31
December		3.77	3.46
TOTAL		37.6	37.3



Willy K. Mutai
Chief Executive Officer
Tea Board of Kenya

30TH MAY, 2025

Table 4: Kenya Tea Exports by Destination (March 2025 vis-à-vis March 2024)

DESTINATION	2025- QUANTITY KGS	2024- QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	17,402,857	18,350,083	-947,226	-5%
EGYPT	5,852,828	10,110,595	-4,257,767	-42%
UK	3,014,386	5,657,212	-2,642,826	-47%
UAE	2,616,034	3,105,747	-489,713	-16%
RUSSIA	2,031,616	2,166,290	-134,674	-6%
JORDAN	1,654,700		1,654,700	
SUDAN	1,415,293	1,188,150	227,143	19%
CHINA	1,170,930	746,963	423,967	57%
KAZAKHSTAN	1,031,622	512,546	519,076	101%
OMAN	1,024,530	154,188	870,342	564%
INDIA	1,008,820	637,312	371,508	58%
SAUDI ARABIA	915,358	2,081,494	-1,166,136	-56%
POLAND	884,792	690,017	194,775	28%
NIGERIA	813,887	51,376	762,511	1484%
SOMALIA	706,866	578,481	128,385	22%
IRELAND	598,234	664,740	-66,506	-10%
CHAD	572,918	1,184,136	-611,218	-52%
SWITZERLAND	541,368	445,724	95,644	21%
IRAN	430,249	1,106,347	-676,098	-61%
YEMEN	407,534	1,518,973	-1,111,439	-73%
SRI LANKA	371,351	221,789	149,562	67%
UKRAINE	289,472	440,560	-151,088	-34%
USA	210,270	364,656	-154,386	-42%
TURKEY	184,196	123,976	60,220	49%
GERMANY	176,930	131,824	45,106	34%
NETHERLANDS	160,654	199,544	-38,890	-19%
MALAYSIA	155,502	185,324	-29,822	-16%
DJIBOUTI	152,700	27,040	125,660	465%
JAPAN	138,000	108,040	29,960	28%
ERITREA	130,000		130,000	
SOUTH AFRICA	122,600	315,508	-192,908	-61%
AFGHANISTAN	119,932	347,426	-227,494	-65%
SOUTH SUDAN	107,740	42,600	65,140	153%



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DESTINATION	2025- QUANTITY KGS	2024- QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
UZBEKISTAN	92,096	11,440	80,656	705%
TAIWAN	67,500	48,160	19,340	40%
BURKINA FASO	67,274	51,746	15,528	30%
SINGAPORE	54,304	3,000	51,304	1710%
COTE D'IVOIRE	50,363	72,442	-22,079	-30%
GABON	49,640	5,174	44,466	859%
KYRGYZSTAN	40,208	86,940	-46,732	-54%
MAURITIUS	40,000	28,000	12,000	43%
HONG KONG	31,970	15,618	16,352	105%
GHANA	28,086	25,464	2,622	10%
ANGOLA	25,354		25,354	
AZERBAIJAN	24,736		24,736	
MOROCCO	24,000		24,000	
AUSTRALIA	23,770	24,000	-230	-1%
AUSTRIA	23,120		23,120	
QATAR	22,436	196,186	-173,750	-89%
MYANMAR	20,892	23,972	-3,080	-13%
BAHRAIN	15,977		15,977	
MALI	15,522		15,522	
CANADA	13,000	38,280	-25,280	-66%
FRANCE	10,368		10,368	
GUINEA	9,486	5,174	4,312	83%
BRAZIL	9,161	4,164	4,997	120%
ITALY	4,600	4,600	0	0%
KUWAIT	350	2,038	-1,688	-83%
CYPRUS		10,286	-10,286	-100%
GEORGIA		13,500	-13,500	-100%
INDONESIA		2,600	-2,600	-100%
IRAQ		22,010	-22,010	-100%
EPZ		47,842	-47,842	-100%
NEW ZEALAND		25,880	-25,880	-100%
PERU		50,400	-50,400	-100%
SPAIN		35,565	-35,565	-100%
ZAMBIA		24,840	-24,840	-100%
TOTAL	47,178,382	54,337,982	-7,159,600	-13%